Forms
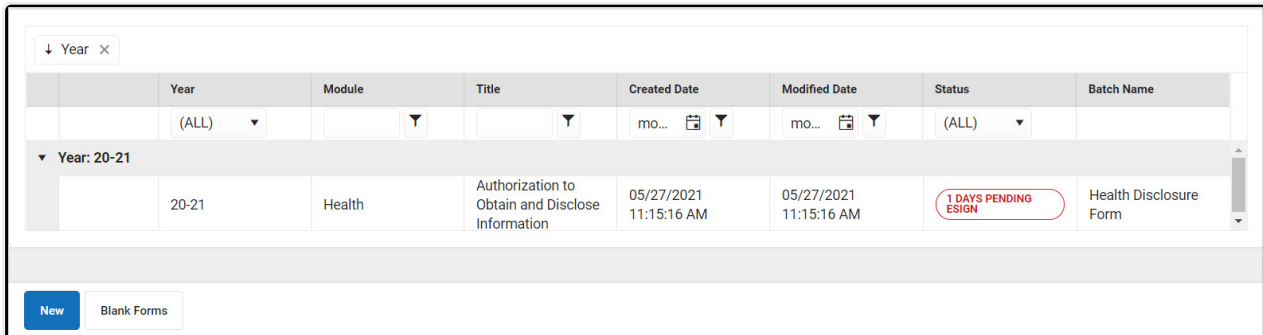
Last Modified on 05/22/2025 10:27 am CDT

List Screen | Blank Forms | Interactive Forms | Select Prepopulation Data | Complete Form | Print | Lock/Unlock | Review Participants | Custom Form eSignatures | eSignature Ad hoc Inquiries | Delete | Copy

The Forms tool stores and manages all Custom Forms attached to a student. Custom Forms added and edited using the module-specific Documents tools display in the Forms tool.

Forms List Screen

Only Custom Forms display in the Forms tool. See the Documents tool documentation for information about the document types available in each module:

- Counseling
- Health
- PLP
- Response to Intervention
- Special Ed

See the Forms Tool Rights article for information about rights needed to use this tool.

List Screen

The List Screen displays all existing Custom Forms attached to a student.

By default all existing Custom Forms are **sorted** by Year, with the most current year on the top. Drag column headers to the top of the screen to further sort. Forms can also be sorted by clicking on the column headers.

Enter text into the fields below the header or select values in the dropdowns to **filter** the list of Forms. The funnel icon ▼ provides ad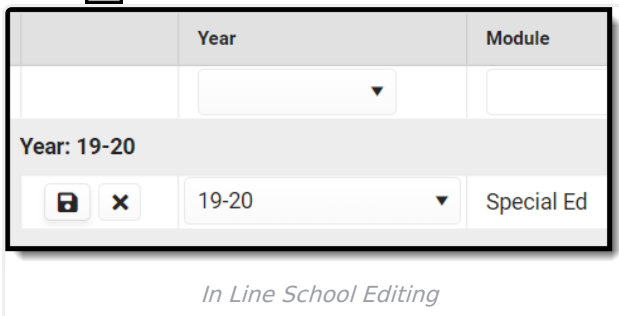ditional filtering options. Custom forms can be filtered by Year, Module, Title, Created Date, Modified Date, and/or Status.

Column Header	Description
Year	The year in which the form is organized.
	When the form needs to be organized into a different year, click the **edit** button ✏ . Select a year from the **dropdown** and then click the **save** button 🖫 or the **cancel** button ✖ to go back.
	In Line School Editing
	The year cannot be modified for batch-created forms.
Module	The module in which the form is organized.
Title	The name of the form.
Created Date	The date the form was created for the student.
Modified Date	The date the form was last edited.

Column Header	Description
Status	The state of the form. Statuses include: **Non-eSignature Documents Statuses** • **Draft**: The form contains errors that must be corrected before completion. • **Locked**: The forms is complete and locked. No further edits can be made. • **Unlocked**: The form does not contain any errors. • **Locked and Published**: The form is complete and is available for parent/guardian(s) and/or students to view on the Campus Parent and/or Student Portal. No further edits can be made. **eSignature Documents Statuses** • **Draft**: The form contains errors that must be corrected before completion. • **Request eSignature**: All errors have been corrected and the form is ready to be sent to the parent/guardian(s) and/or student for eSignature. • **X Days Pending eSign**: The number of days the signature request was sent and is awaiting eSignature. • **X Days Pending Publish**: The number of days until the form is sent to the portal. • **Expired**: The End Date of the form has passed. • **Action Required**: Indicates all signatures are collected and the form is ready to be completed. • **Requesting eSignature**: The form is set up for eSignature, assigned to a student, and has not yet been sent for eSignature. • **Declined Terms and Conditions**: One or more guardian(s) declined the terms and conditions. • **Locked and Signed**: The form is complete and all participants have signed the document. No further edits can be made. • **Locked and Declined**: The form is complete and a participant declined the document. No further edits can be made. • **Locked and Overridden**: The form is complete and the user has overridden at least one signature. No further edits can be made. • **No Participants**: There are no active Portal accounts. • **Unlocked**: The user has confirmed there are no participants. The form is read-only on the Portal. **Note**: When the form has no participants, the user can contact their administrator regarding updating Census information OR they can confirm that there aren't any participants by selecting the individual form and Review Participants > Confirm No Participants. The form becomes read-only.
Batch Name	Indicates the form was created with the Form Batch Setup tool. Batch created forms CANNOT be deleted from the Forms tool.

Blank Forms

Blank forms are print only versions of district or state-defined forms. Blank Forms are uploaded to Campus in the Custom Forms area of System Administration.

Click the Blank Form button Blank Forms to view all the Blank Forms available to print.

Module	Title
Counseling	Field Trip Form
Counseling	NHS Serivce Form
Counseling	Scholarship Reporting Form
Counseling	Student of the Month Award
Counseling	Student Transfer Form
Health	Head Injury
Health	HIPPA Compliancy
Health	Informational: Head Lice
PLP	RTI Meeting Notes
PLP	Summer School Registrtion Form
PLP	ESL Accommodations Form

Select Blank Form List Screen

Click the print icon at the top of the PDF menu 🖨 to print. Printing through the browser (File > Print, etc.) prints the Index, not the form itself.

Print Blank Form

Interactive Forms

Interactive Custom Forms are editable documents used to supplement documents linked to a person's record. To create a new Custom Form, click the **New** button New . The **Select Form** screen displays all active forms available.

See the Custom Forms tool for information on how to set up each of the Form types. Other options for forms that can be created using the Forms tool include:

Form Type	Description
Interactive	- Displays on Forms tool - Teacher/user can fill out the form
Interactive, Portal	- Displays on Forms tool - Teacher/user can fill out the form - Read-only on Portal
Interactive, eSign	- Displays on Forms tool - Teacher/user can fill out the form - Parent/guardian and/or student can sign the form via the Portal

Form Type	Description
Interactive, p Fillable	• Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal • Parent/guardian and/or student can fill out the form
Interactive with DB Table	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form
Interactive with DB Table, Portal	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Read-only on Portal
Interactive with DB Table, eSign	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal
Interactive with DB Table, p Fillable	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal • Parent/guardian and/or student can fill out the form

Select Form

Module	Title	Form Instruction	Form Type
Health	Authorization to Obtain and Disclose Information		Interactive, p Fillable
Health	Injury Report		Interactive
Health	Physical/Medical History		Interactive
Health	Student Medication		Interactive
Health	Diabetes Plan		Interactive

Cancel

Select Form

Select Prepopulation Data

The content of existing custom forms associated with a person will not change when an Administrator changes Ad Hoc mappings on the form in System Administration. See the Custom Forms article for additional information.

When setting up a Custom Form, form administrators can map Ad hoc fields to editable fields in the form. These mapped fields populate based on the person's data to which the form is attached.

Forms may include multiple fields mapped to the same Ad hoc field, such as reporting a list of team members or behavior events. Sequence values are selected for fields in a list when the form is created in System Administration. The user creating the form then indicates the order in which records should populate the form. This process is best illustrated with an example.

Military Connection Example

An example form includes a list of a person's team members. When mapping Ad hoc fields to the form, the form administrator aligned guardianMilConnections.guardianFirstName and guardianMilConnections.guardianLastName to two fields in a list, with Sequences of 1 and 2. When a user selects the form to add to a person, the first step is to select which records populate in these fields and in what order. Select records from the dropdown list and reorder them as desired by clicking and dragging records.

Select Records to Prepopulate Data in the Form

Multiple Guardians and/or Address Selection

When students have multiple guardians and/or addresses, users can select which guardian or address populates from a dropdown. The following Ad hoc fields allow for this selection:

- guardians.personID
- guardians.guardianFirstName
- guardians.guardianLastName
- guardians.guardianFirstLastName
- guardians.guardianAddress

After making all selections, click the **Create Form** button. The selected records display in the indicated order in the form.

Complete Form

The **Name** and the **Instructions** display at the top of the form. The header also indicates the form displays on Roster and/or Portal or sent to the parent/guardian and/or student for eSignature and data entry.

A warning icon displays in the upper right corner when errors occur, such as missing required fields or overfilled fields. Click this button to navigate through the errors on the form. An unlocked icon displays when there are no errors, and the form is unlocked. A locked icon displays when there are no errors, and the form is locked.

A draft of the form can be saved with rule errors. However, a document draft will not save when there are overfilled fields.

Example Custom Form with Errors

Enter and/or select data in the form as needed. Click **Save & Stay** to save progress and continue working on the form or **Save** to save progress and navigate to the list screen. Or, click **Cancel.**

Print

When text entered in a multiline text field on a custom form goes beyond the capacity of space on the page, the overflow text displays on subsequent pages when the form is printed. The text on one page ends with the word **Continued** and a **Letter-Number** combination in parenthesis which indicates where the text is continued on another page. See the Custom Forms article for additional information concerning the overflow functionality.

For example, a text field ends with "Continued A1," the text is continued on an overflow page labeled **Appendix A1** (see image 8 below). The ellipsis (...) under the Appendix label indicates the text is continued from a previous page.

Blowfish can range in size from 1-inch long (dwarf or pygmy puffer, Carinotetraodon travancoricus) to over 2 feet (giant puffer, or Tetraodon mbu). These fish do not have scales but instead have spines that are even more formidable after inflation.

Blowfish eyes move independently from one another. The fish have a prominent beak with four teeth that allow them to eat algae, crustaceans, mollusks and red worms. It is these teeth that give rise to the "Tetraodontidae" (continued A1)

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Kaiser, Branson L
Prior Written Notice
Appendix A, Page 1 of 1

Appendix A1
...
name: tetra (four) and dontinidae (teeth).Blowfish can range in size from 1-inch long (dwarf or pygmy puffer, Carinotetraodon travancoricus) to over 2 feet (giant puffer, or Tetraodon mbu). These fish do not have scales but instead have spines that are even more formidable after inflation.

Overflow Print Example

The maximum capacity for each overflow text field is 1 MB, with a maximum of 4 MB per form.

Overflow Setup

When creating the form in Adobe, the multiline option must be selected under Text Field Properties. The Overflow checkbox must also be marked in System Administration. See the Custom Forms documentation to learn about Custom Form setup.

Print Draft Custom Forms

A Draft watermark displays when printing Custom Forms in a draft status.

Draft Custom Form

Print Expired Custom Forms

An Expired watermark displays when printing Custom Forms in an Expired status.

Expired Custom Form
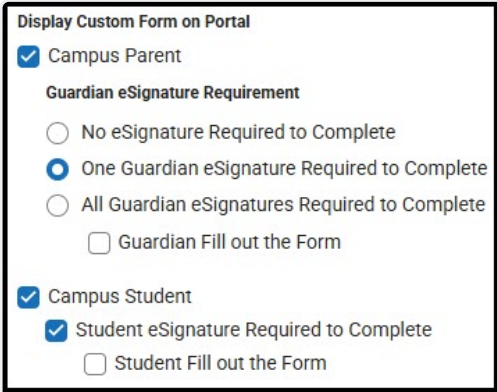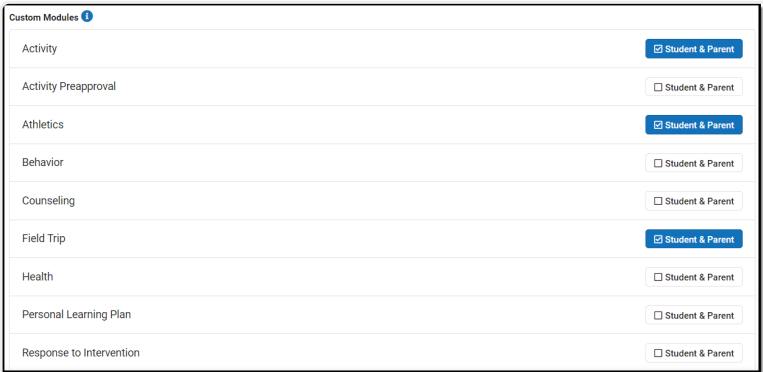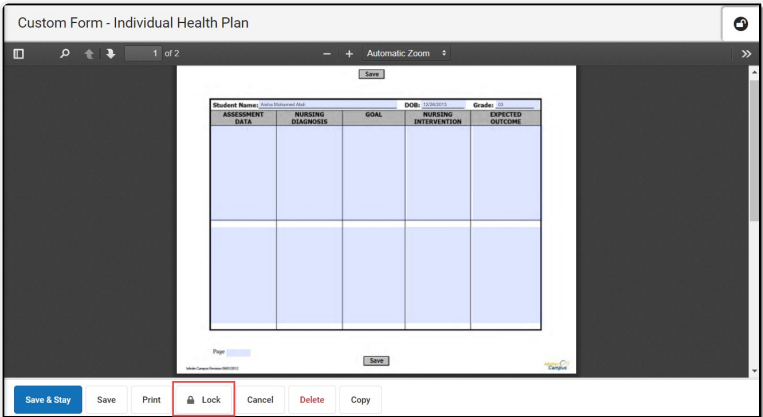
Lock/Unlock

> The Lock and Unlock button does not display for Custom Forms that are eSignature Requests. See the Review Participants section for additional information.

Users can click the **Lock** 🔒 Lock **or Unlock** 🔓 Unlock button to change the lock status of the document. A locked document indicates no additional changes can be made. Before locking or unlocking, a validation message displays, alerting the user to the logic associated with locking a form.

Certain Custom Forms display on Campus Parent and/or Campus Student Portal once the form is locked. Three conditions must happen in order for a Custom Form to display on the portal:

Step	Image *Click to Enlarge*
1. On the Custom Forms Upload step, mark the **Campus Parent/Campus Student** AND the **Request eSignature** options. The number of eSignatures required can be determined by selecting one of the following options: • **One Guardian eSignature Required to Complete** - Only one guardian signature is required for a staff member to complete the form. When multiple guardians exist for a student, staff can select which guardian receives the form from the Forms tool. When assigning forms via the Form Batch Setup tool, the form is sent to all guardians for the student and the first guardian to sign the form locks out the other guardian from signing the form. • **All Guardian eSignatures Required to Complete** - All student guardians must sign the form for staff to complete it. The only student eSignature option is **Student eSignature Required to Complete**.	 *Display Custom Form on Portal Options*

Step	Image *Click to Enlarge*
2. Mark the Portal Preference for the module the form is in at System Administration > Portal > Preferences > Display Options on the Documents section. Portal preferences are set by school. See the Portal Preferences Display Options documentation for additional information.	 *Display Options for Custom Modules*
3. Attach the Custom Form to a student and lock the document (either on the Forms tool or the Documents tool).	 *Lock a Custom Form*
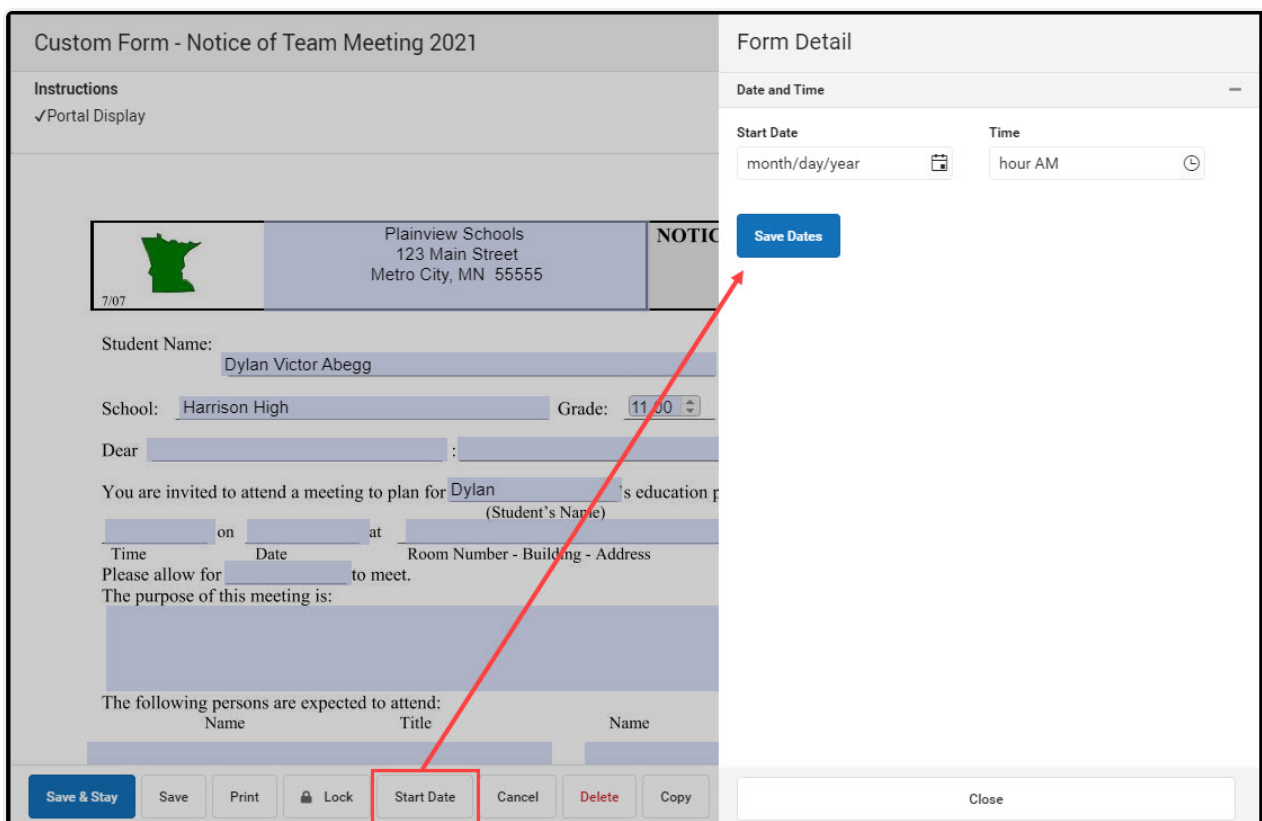
When a form is locked and published, the status of the form on the Forms list screen displays as Locked & Published LOCKED & PUBLISHED . Hover over the locked icon within the form to view a message that the form is locked and published.

The ability to lock a document is given when the user has **W**rite rights to the Forms tool. The ability to unlock a document requires **RWAD** rights to Student Information > General > Forms > Module > Unlock AND **W**rite rights to the Forms tool (Student Information > General > Forms). See the Forms Tool Rights documentation for additional information.

Optional Start Date and Time

A Start Date and Time can be set for Forms that are sent to the Campus Parent and/or Campus Student in the future. So when the above conditions have been met concerning the Portal setup, the Form is Locked, and a Start Date and Time are set; the Form is published to the Portal as of the Start Date and Time.

> The **Start Date** button does not display when the school's Portal Display Options are not set.

Portal Start Date and Time

Review Participants

> Forms support emancipated student functionality. When a form is marked to be sent to the Parent Portal, emancipated students receive it via the Parent Portal. See the Emancipated Students documentation for information on setting up emancipated students.

The **Review Participants** button displays after an initial save. When finished entering data into the form, click the **Review Participants** button to verify to whom the form is being sent and send eSignature request(s). The Form Detail also allows the user to select when the Form is sent (**Start**

Date and **Time**) and when it becomes read-only on the Portal (**End Date**).

When multiple guardians exist for a student, and only one signature is required, staff can select which guardian(s) receives the form. Staff can send the form to multiple guardians, but whichever guardian signs the form first prevents the other guardian(s) from signing. The other guardian(s) can still view the form. See the Custom Forms Setup tool article for information about the guardian requirement settings.

Guardian(s) without active portal accounts display in the **Portal Account Not Active** section.

The **Review Participants** button does not display when the school's Portal Display Options are not set.

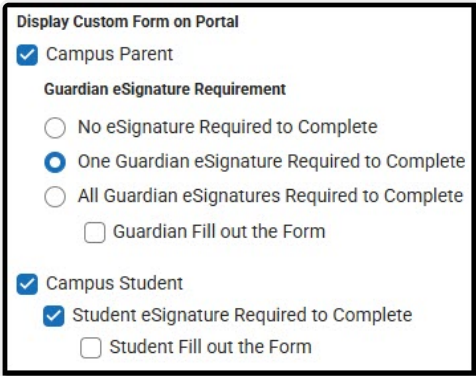
Review Participants Side Panel

Custom Form eSignatures

When the Request Parent/Guardian and/or Student Signature option is selected on the Custom Forms Setup tool, this form is sent to parent/guardian(s) and/or the student for an electronic

signature (eSignature). Note certain forms allow the parent/guardian and/or the student to enter data.

> **Note:** eSignature Custom Forms do not sync to the state for State Edition users. Custom Forms with eSignatures ONLY display on the Forms tool and are not available on the Documents tool.

For an eSignature Request/Fillable form to be sent to the Campus Parent or Campus Student Portal, the following conditions must be met:

Step	Image *Click to enlarge*
1. On the Custom Forms Upload step, mark the **Campus Parent/Campus Student** AND the **Request eSignature** options. The number of eSignatures required can be determined by selecting one of the following options: • **One Guardian eSignature Required to Complete** - Only one guardian signature is required for a staff member to complete the form. When multiple guardians exist for a student, staff can select which guardian receives the form from the Forms tool. When assigning forms via the Form Batch Setup tool, the form is sent to all guardians for the student and the first guardian to sign the form locks out the other guardian from signing the form. • **All Guardian eSignatures Required to Complete** - All student guardians must sign the form for staff to complete it. The only student eSignature option is **Student eSignature Required to Complete**.	 *Display Custom Form on Portal Options*

Step	Image *Click to enlarge*
2. Mark the Portal Preference for the Module the form is in at System Administration > Portal > Preferences > Display Options on the Documents section. Portal preferences are set by school. See the Portal Preferences Display Options documentation for additional information.	 *Display Options for Custom Modules*
3. Save the Custom Form for a student and click the Request eSignatures button. Requesting eSignatures makes the form read-only. You are not be able to make additional changes after requesting signatures.	 *Request eSignatures Button*
4. Parent/Guardian(s) receive the eSignature request(s) when the **Guardian, Mailing,** and **Portal** checkboxes are marked on the Relationships tool for the student. The Parent/Guardian must have a valid Portal account in order to receive eSignature forms. The order of the Parent/Guardian(s) names is determined first by the **Emergency Priority** on the Relationships tool. When no Emergency Priority is entered, the names display in alphabetical order.	 *Relationship Checkboxes for eSignature*

Request eSignature(s) Process

1. Enter data into the form.
2. Click **Review Participants.**
3. Optional: Select a **Start Date** and **Time** when the form is available on the Portal, after eSignatures have been requested.
4. Optional: Select an **End Date** when the form becomes read-only on the Portal.
5. When multiple guardians exist and only one signature is required, select which guardian to

receive the form. When all guardian signatures are required, no guardian selection can be made.

6. Click **Request eSignatures** or **Cancel**. Requesting eSignatures makes the form read-only. You are not able to make additional changes after requesting signatures.

> **Note**: The End Date field can be changed, even after the form is Expired. The Start Date and Time CANNOT be changed once the eSignature(s) is requested.

After the eSignature Request(s) have been sent, the **Review Participants** button can be used to see the status per person and override eSignatures and/or enter a contact log record. Statuses include:

- **Signed**: The person signed the form.
- **Declined**: The person declined the form.
- **Pending**: The form is awaiting action by the person.
- **In Progress**: The person is currently editing the form. When a person has an In Progress status, their signature cannot be overridden.
- **Overridden**: The teacher has overridden that person's signature.
- **Declined Terms**: The participant declined the Terms and Conditions.

Override eSignature Request(s)

The Override eSignature Request option forces the eSignature to be signed so the form can be completed. This option can be used when for any reason a parent/guardian or student is unable to eSign or a paper form is signed and submitted instead of the virtual form.

> Overriding eSignatures requires a separate tool right. See the Forms Tool Rights article for additional information.

Override eSignature Request

1. Click **Review Participants** after the eSignature request(s) have been sent.
2. Mark the checkbox for the person whose signature is to be overridden.
3. Enter an **Override Comment.**
4. Click **Save Override.** The Status of this form after the user **Completes** the form is Locked & Overridden.

eSignature Contact Log

The Custom Forms Contact Log is used to document any interactions between the participants of the Custom Form.

eSignature Contact Log

1. Click **Review Participants** after the eSignature request(s) have been sent.
2. Mark the checkbox for the person who was contacted.
3. Select the **Date** and **Time** when the contact occurred.
4. Select the **Contact Options** from the dropdown. This dropdown is populated from the Attribute Dictionary > ContactLog > Contact Type.
5. Enter a **Description** of the communication.
6. Click **Save Contact Log.** Multiple Contact Log records can be saved per form. Contact Log records can be created any time after the eSignature request(s) have been sent, including after the form is Completed.

eSignature Ad hoc Inquiries

Tool Search: Filter Designer

Custom Forms with eSignature can be queried in Ad hoc at Student > Form Status.

Form Status Ad hoc Folder

Ad hoc Field	Description
documentID	The unique identifier of the document.
formID	The unique identifier of the form.
module	The module where the form was set up.
formDocName	The name of the form.
createdBy	The name of the person who assigned the form to the student.

| Ad hoc Field	Description
formStatus	The current status of the form. Options include: • **Draft** - The form was created but has not yet been published. • **Locked & Published** - The form has been locked, no signatures are required, and a copy was published to the portal. • **Locked** - The form has been locked, no signatures are required, but a copy has not yet been published to the portal. • **Unlocked** - The forms is not locked and no signatures are required. • **Locked & Signed** - The form was signed and locked. • **Locked & Declined** - The participant accepted the terms and conditions but declined to sign the form. The form is in a locked status. • **Locked & Overridden** - The form is locked and the signatures were overridden. • **X Days Pending Esign** - The number of days the form has been published to the portal but a participant has not yet taken action. • **X Days Pending Publish** - The number of days until the form is published on the portal. • **Action Required** - The form is locked, and every participant has signed it OR one or more participant(s) declines. • **Requesting eSignature** - The form is set up for eSignature and is has been assigned to a student, but has not yet been published to the portal. • **No Participants** - The form is set up for eSignature but there are no participants with active portal accounts or participants with the appropriate relationship set up. • **Declined Terms & Conditions** - The form is locked and published to the portal, but one or more participants declined the Terms and Conditions. • **Expired** - The form has exceeded the due date with no action.
modifiedDate	The day the form was last edited.
studentLastName	The student's last name.
studentFirstName	The student's first name.
studentPersonID	The student's personal identifier.
signerLastName	The last name of the person who signed or declined the form and/or terms and conditions.
signerFirstName	The first name of the person who signed or declined the form and/or terms and conditions.
signerPersonID	The person's personal identifier who signed or declined the form and/or terms and conditions.
relationship	The relationship between the signer and the student

Ad hoc Field	Description
participantStatus	The participant status that displays in the UI (Review Participants side panel). Options include: • **Request eSignature** - The default status that displays when users first open the Review Participants side panel and there are eligible signers. • **Pending** - The form was sent for eSignature but the participant has not yet signed. • **In Progress** - The participant has started working on the fillable form but has not yet signed or submitted it. • **Signed** - The participant signed the form. • **Declined** - The participant declined the form. • **Overriden** - The signature was overridden. • **Declined Terms** - The participant declined the Terms and Conditions.

Delete

Click **Delete** [Delete] to remove a document from a person's record permanently. A warning displays confirming the action.

Once an eSignature request has been sent, users cannot delete the form.

Copy

Click the **Copy** button [Copy] on an existing document to create a copy. A warning displays confirming the action. The user is automatically navigated back to the list screen, and the new copy of the document can be found with a date and timestamp of when it was created.

Only existing forms can be copied. The document's name cannot be modified when making a copy.